



VINYARD

The Weekly Vine – Produce Market Forecast October 10 thru 16, 2026

Market Snapshot

- **Salinas Valley lettuce production remains the industry's primary concern.** INSV, mildew, soil-borne diseases, tip burn, reduced acreage, and persistent light weights continue restricting harvests. Cooler fall weather has moderated demand slightly, but supplies remain well below seasonal norms and elevated markets are expected to persist through mid-October.
- **California fall vegetable production continues performing exceptionally well.** Tomatoes, cucumbers, bell peppers, squash, eggplant, sweet corn, green beans, and specialty vegetables continue offering excellent quality, ample supplies, and competitive pricing despite normal seasonal acreage reductions.
- **Mexico continues providing dependable import volume** across tomatoes, peppers, cucumbers, avocados, limes, grapes, mangoes, and tropical fruit, helping stabilize North American supplies during ongoing seasonal transitions.
- **Seasonal transitions continue affecting several key commodities.** Lemons, avocados, asparagus, Brussels sprouts, broccoli, onions, potatoes, pineapples, chili peppers, green onions, and leafy greens remain the primary markets experiencing tighter supplies and elevated pricing, while most hard vegetables and warm-season crops continue offering excellent value.

🍎 Fruit & Citrus

Item	Current Supply & Pricing	Quality & Notes
Apples ●	Strong supply; stable pricing	New crop harvest continues with outstanding color, firmness, sizing, and excellent eating quality.
Avocados ●	Tight supply; elevated markets continue	Mexican harvests continue improving gradually, but larger fruit remains limited and pricing stays firm.
Bananas ●	Stable imports	Excellent quality with dependable year-round availability.
Grapefruit ●	Moderate supply	Larger sizes remain somewhat limited while internal quality remains excellent.
Limes ●	Good supply; steady pricing	Excellent quality. Smaller counts remain tighter than larger fruit.
Oranges (Valencias) ●	Strong demand	Exterior appearance remains variable while internal quality and juice content continue to be excellent.
Lemons ●	Tight supply; elevated pricing	California district transition continues. Small and medium sizes remain difficult to source.
Cantaloupe ●	Good supply	Excellent sugar content, sizing, and overall value continue.

Item		Current Supply & Pricing	Quality & Notes
Honeydew	●	Good supply	Excellent eating quality with plentiful availability.
Watermelon	●	Strong domestic supply	Multiple growing regions continue supporting excellent quality and competitive pricing.
Pineapple	●	Tight supply persists	Import arrivals remain inconsistent with lighter volume and elevated pricing.
Grapes	●	Strong domestic supply	Excellent quality, color, sizing, and flavor across both red and green varieties.
Mangoes	●	Strong import supply	Mexico is finished for the season. South American fruit moving forward until Spring 2027.
Papaya	●	Steady supply	Occasional softness continues on some arrivals; overall availability remains dependable.
Kiwi	●	Strong supply	Excellent firmness and overall quality.

🌱 Vegetables, Herbs, Greens & Others

Item		Supply / Market Direction	Quality & Issues
Asparagus	●	Tight supplies continue	Thin sizing and occasional quality concerns persist, particularly on imported product.
Bell Peppers	●	Good supply	California production remains strong with excellent quality and color.
Chili Peppers	●	Tight supply	Elevated pricing continues as lighter harvests and mixed sizing persist.
Broccoli	●	Moderate supplies	Disease pressure and recent weather impacts continue limiting yields, although overall quality continues gradual improvement.
Cauliflower	●	Stable supply	Smaller heads remain common; quality continues improving.
Brussels Sprouts	●	Tight supply	Seasonal transition and disease pressure continue restricting harvest volume.
Celery	●	Moderate supply	Minor fringe burn occasionally reported; markets remain relatively steady.
Carrots	●	Strong supply	Excellent quality with dependable availability.
Spinach / Tender Leaf / Herbs	●	Tight supply	Disease pressure, yellowing, and light weights continue limiting production.
Lettuce (All Types)	●	Demand exceeds supply	INSV, mildew, tip burn, reduced acreage, and light weights continue supporting elevated markets.
Tomatoes	●	Moderate supply	California and Mexico continue providing good availability. Markets remain slightly elevated as Eastern production winds down.

Item	Supply / Market Direction	Quality & Issues
Green Beans 	Good supply	Domestic production remains strong with favorable markets and excellent quality.
Cucumbers 	Good supply	Strong domestic and Mexican production supports stable pricing.
Green Onions 	Very limited supplies	Minor tip burn persists and supplies remain constrained.
Mushrooms 	Steady supply	Consistent sizing and excellent quality.
Tomatillos 	Good supply	Excellent availability and quality.
Onions 	Seasonal transition continues	New crop volume continues increasing; markets stabilizing although smaller sizes remain limited.
Potatoes 	Slightly elevated pricing	New crop Russets continue shipping. Larger sizes remain somewhat limited while overall supplies improve gradually.
Squash 	Good supply	Strong production with excellent overall quality.
Eggplant 	Good supply	Excellent California quality and availability.
Corn 	Good supply	Excellent quality and consistent availability.

Berries

Strawberries

- California production remains steady.
- Excellent sizing, color, and flavor.
- Stable supplies and favorable markets expected through next week.

Raspberries

- Supplies remain somewhat limited.
- Delicate condition continues reducing shelf life.
- Markets remain firm.

Blueberries

- Imported Peruvian volume continues increasing as domestic production winds down.
- Excellent quality and dependable availability.
- Favorable markets continue.

Blackberries

- Moderate supply.
- Occasional softness and red-cell issues continue.
- Quality improving with newer harvests.

Looking Ahead

-  **Lettuce** will remain the industry's most volatile commodity as Salinas Valley disease pressure continues limiting production through October.
-  **Avocado** supplies should continue improving gradually, although elevated pricing is expected until heavier Mexican harvests develop.
-  **Tomato** markets should remain slightly elevated as California and Mexico become the primary suppliers across North America.
-  **Chili peppers** are expected to remain one of the tightest vegetable markets with elevated pricing continuing through October.
-  **Brussels sprouts** will remain elevated as disease pressure and seasonal transitions continue restricting supplies.
-  **Pineapple** availability is expected to remain constrained with little immediate market relief.
-  **Broccoli, asparagus, potatoes, onions, green onions, spinach, and lemons** are expected to remain active markets through mid-October.
-  **Cucumbers, carrots, grapes, bell peppers, squash, sweet corn, mushrooms, eggplant, tomatillos, green beans, melons, and watermelons** should continue offering excellent availability and stable pricing.
-  **Cantaloupe and honeydew** should remain among the strongest fruit values as western production winds down seasonally.
-  **Blueberries** should remain readily available as imported volume continues increasing.
-  **California strawberries** are expected to continue delivering excellent quality, stable supplies, and favorable markets through mid-October.